

The Wayne County Summer Camp Industry

A Study of the Economic Impacts of the Industry



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**The Wayne County Camp Association and the
Wayne Industrial Development Corporation**

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Acknowledgments

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Summary of Key Findings

The following are a few of the most salient findings from the three surveys of the camp industry. Some 20 camps, 61 employees and 138 parents are represented in the surveys tabulated. The overall response was excellent. The results have been supplemented with interview findings and objective data from such sources as the Bureau of Economic Analysis.

1) **Camps are businesses with staying power.**

The average camp has been a mainstay of the local economy for 58 years.

2) **Camps preserve valuable open space.**

Just those camps responding to the survey represented almost 5,800 acres of largely open land. The average camp is approximately 362 acres in size.

3) **Camps are major businesses.**

Those camps responding to the survey alone spent almost \$33,500,000 in 2001 operating their programs. The average camp spent nearly \$2,230,000, including approximately \$409,000 of local expenditures. The combined impact on the regional economy is an estimated \$24 million.

4) **Camps represent major investments in the local economy.**

Those camps responding to the survey invested some \$17,666,000 to improve their facilities over the last five years. The average camp spent \$1,178,000 on improvements over this period.

5) **Camps are large taxpayers.**

Those camps responding to the survey alone paid over \$665,000 in property taxes in 2001. The average taxpaying camp paid out \$47,555 in local property taxes. Analysis of Wayne County assessment data indicates that children's camps pay over \$1,100,000 in property taxes and pay from 8% to 21% of those taxes in the top five camp communities.

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6) **Camps are excellent employers.**

Some 92% of employees (47% of whom were from Pennsylvania) rated their level of job satisfaction as excellent, primarily based on their enjoyment of the work (46%) and its seasonal nature (21%).

7) **Camps buy local.**

Camp employees indicated their first, second and third choices for local purchases were Honesdale, Scranton and Hancock businesses. These included \$1,776,000 in food expenditures, for example, some 52% of all food purchases.

8) **Camps are quality businesses and representatives of the area.**

Some 95% of camper parents rated the facilities used by their children as “excellent.” Reasons included quality of the facilities (35%), quality of programs (32%) and quality of the location (13%).

9) **Camps create other tourism.**

Some 44% of camper parents stated that visiting the camp made them want to visit the area for other reasons. While visiting the area, camper parents spent an average of \$394 per day in the region on lodging, dining and other services.

10) **Camps introduce investors to the area.**

Some 10% of camper parents stated that visiting the camp made them want to consider investing in the area.

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1.0 Study Background and Methodology

The Wayne County Camp industry is one of Wayne County's most valuable assets. It contributes in several ways to drive the County economy. This study, undertaken in 2002, reveals the extremely important nature of those contributions. It was conducted under the auspices of the Wayne Industrial Development Authority (WIDCO) in cooperation with consultants Thomas J. Shepstone, AICP and Howard J. Grossman, AICP.

This study was accomplished in consultation with the Wayne County Camp Association, through its Board of Directors. Interviews were conducted with camp representatives in a process that allowed any member of the Camp Association to express ideas and suggestions about the industry's regional role, now and in the future. Surveys of member camps, parents and employees of the various camps were done by questionnaire. Additional information from the Bureau of Economic Analysis, US Department of Commerce and other sources was also compiled by the independent consultant team, which is responsible for analysis and conclusions contained in this report. Camps outside of the Wayne County Camp Association membership were also surveyed.

Some 29 Association member organizations and five other camps were mailed surveys. Altogether, some 16 camping organizations accounting for 20 camps responded. This was, at a 59% response rate, an excellent return. Each responding camp was also asked to send out 10 parent and 5 employee surveys for return to the consultants. Some 138 parent and 61 employee responses were obtained for response rates of 69% and 61%, respectively, also excellent. Copies of the survey instruments used are attached as Appendix 2 of this report.

An earlier study of the economic impact of the Wayne County camp industry was undertaken by the Economic Development Council of Northeastern Pennsylvania (now called the Northeastern Pennsylvania Alliance) in 1975. Therefore, the new analysis represents the first time in 27 years that the impact of the industry on the area has been evaluated.

Like any other economic sector, the Wayne County camp industry produces both direct and indirect impacts on the area. Both were studied as part of this project. Direct impacts reflect the immediate contributions that the local economy receives from camping in the form of jobs created, income received and expended to vendors and taxes contributed.

Indirect impacts are those that are expressed through income being recycled throughout the Wayne County economy several times as the original monies generated are re-spent on goods and services purchases. Some portion of those funds stay within the area as they are re-spent and this is what is commonly known as the multiplier effect. These impacts extend to income, jobs and total output and support the local economy throughout the year. They also contribute to

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the economic health of the region and the Commonwealth of Pennsylvania as a whole. Given this background, the purposes of this study were to:

1. Demonstrate the direct and indirect impacts of the camp industry on Wayne County and the local area in general.
2. Promote the voice of the industry with local officials, the General Assembly of Pennsylvania and the U.S. Congress.
3. Document the added value that camps contribute to the area economy and quality of life.

The following sections detail the results of the surveys conducted, analyzing this and other information to draw conclusions in these regards and offer recommendations.

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2.0 Overview of the Summer Camping Industry

The summer camp industry has existed in Wayne County for nearly a century. It is a specialized industry found in relatively few other areas of the country. There are other summer camps in the Adirondacks, Maine, the Berkshires, the Midwest and West but Wayne County's camps are unusual in two respects. They tend to be full season operations and some have a strong religious component. This makes the industry a particularly good niche business for the area.

Close proximity to Manhattan is a valuable asset for Wayne County's camps because the market is relatively limited. Association members indicate only about 3% of households can afford to send their children to summer camp and only 1% or so of households fit market demographic characteristics. It is, indeed, a very targeted market that Wayne County happens to be in a good position to service.

Nevertheless, there are new markets developing. Many camps are now running post-camp programs of a sporting or other special nature with appeal to broader markets. Also, new markets are developing for shorter camping seasons of one to four week in duration that make camp more affordable and allow repeat use of facilities over a slightly longer season. Some Wayne County camps are already offering shorter programs.

Like all industries, camping has evolved over the years. Internet and referral marketing are now extremely important for example. Some camps offer "computer halls" for their campers. More parents tour camps and evaluate them before making their choice. Parents visit more often generally and are looking for complementary experiences, quality restaurants and lodging. The client base is one of very high expectations and camp owners have to continually upgrade and add to their programs to meet those expectations.

Wayne County's camps are generally doing well and have good prospects for future growth if they can continue to improve. Challenges include finding quality hotel and bed and breakfast accommodations for parents and identifying additional entertainment and cultural opportunities. Arguably, areas such as the Berkshires currently offer much more but proposed performing arts centers in Bethel and Bushkill and hotel development projects now underway will very much improve Wayne County's position.

Establishing better business relationships with vendors will also go a long way to increase competitiveness, bearing in mind that many camps have to give up as much as 15% of their fees to referral agencies today and must make that up in better buying arrangements with their own vendors. The Wayne County Camp Association's relatively new annual trade show for vendors is an excellent initiative that should, over time, help to address this need.

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Camping is an important industry in Wayne County. It pays 2% of all property tax bills without generating any school costs, the primary expense of local government. No other commercial or industrial enterprise (except electric utilities) exceeds its tax contributions. Preserving and further developing the industry should be a goal of Wayne County and surrounding localities. This report is intended to set the stage for such a continuing effort.

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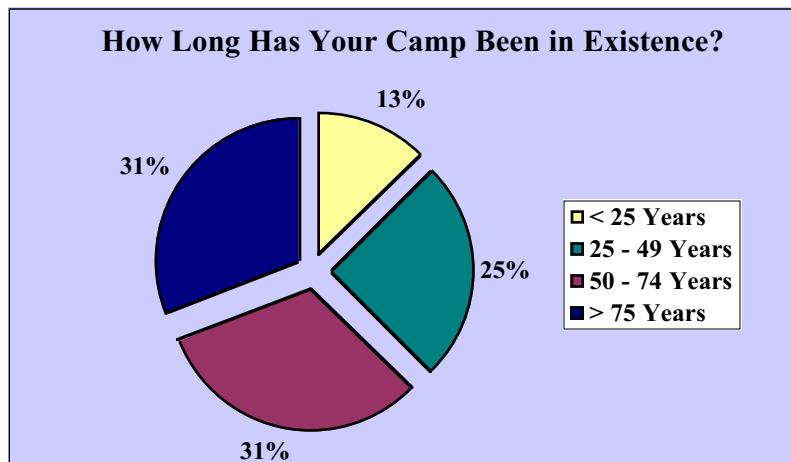
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3.0 Wayne County Camp Characteristics

For several generations now, the Wayne County camp industry has successfully provided services and had a strong and vital economic impact on the County. It is a significant job producer, a supporter of community life and a positive tax revenue producer. It is, too, a conserver of land that is valuable open space to the region. It connects the County to an outside income base, allowing it to import revenues from campers, employees, parents and other sources in the metropolitan area to the benefit of residents.

The map following demonstrates locations of summer camps within Wayne County. Many municipalities have camps located within their borders, particularly those north of Honesdale. Nearby communities in Pike and Susquehanna Counties also include several camps, some of whom are members of the Wayne County Camp Association. These, too, were surveyed for this study. There are, in addition, a number of camps who are not members of the Association but make the same types of contributions to the economy. Camping, as a result, has a much larger presence in the region than Camp Association numbers alone might indicate.

Most camps have been in existence for many years (an average of 58 years), with some 63%, of the camping organizations having existed for 50 years or more. This business longevity is unusual in any industry and speaks volumes about the strength of camping. As a particularly well established industry, it provides a solid resource and asset base for the County. It helps supports many other sectors of the economy including governmental, private and nonprofit.

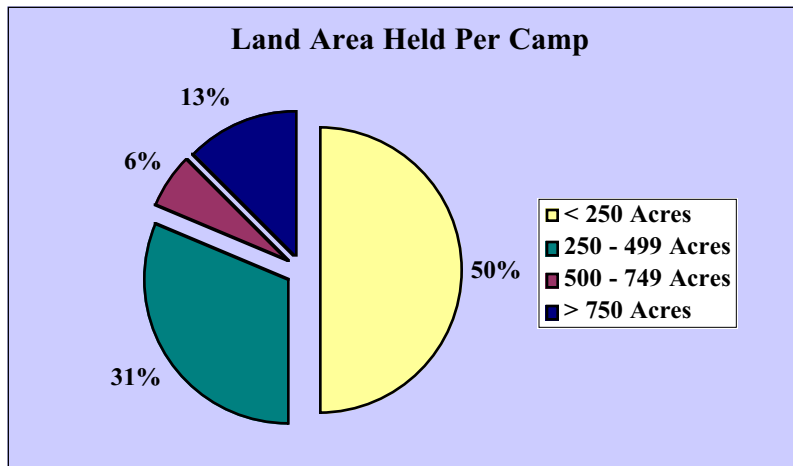


The camp industry uses a great deal of land and maintains large open spaces in many instances. Two camps have 1,000 acres or more, for instance. Eleven camps have between 200 and 1,000 acres. Camps surveyed range in size from 74 to 1,200 acres with an average of 362 acres. Obviously, the more acreage involved, the more opportunities there are for future camp

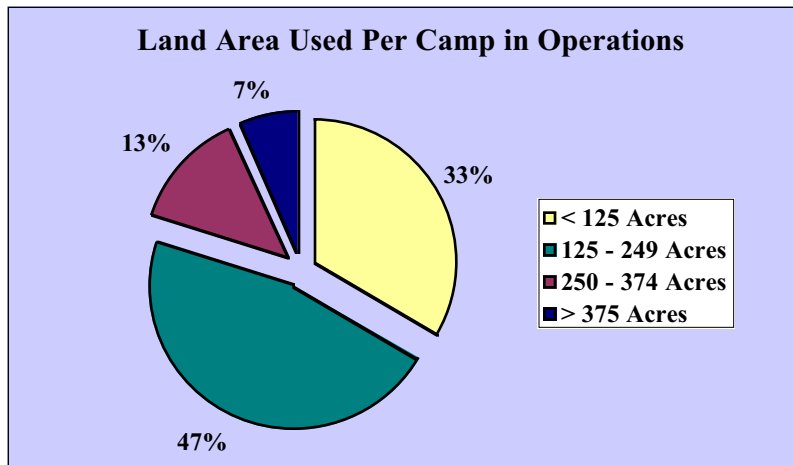
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expansion and the more land that is protected as valuable open space within the community.



Land use data indicates that much of the acreage currently held by camp organizations is not directly utilized in their operations. Acreages used directly in camp operations ranged from 34 to 750 acres, with five camps having 200 or more acres being used for direct operations, and 12 with 100 acres or more. The average amount of land used in direct operations is 188 acres.



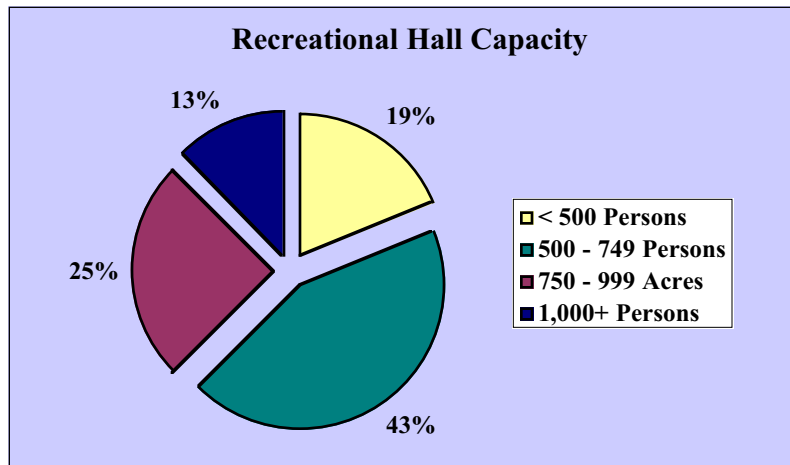
Lake frontage is typically very important to the summer camping industry. Most camps are, in fact, built around prominent bodies of water used for recreation and as scenic attractions. This is one of the reasons so many have located in Northern Wayne County where this is an abundance of lakes. The range in lake frontage, for those camps surveyed, was 300 feet to 9,000 feet. Pond and lake sizes ranged from four to 90 acres.

Infrastructure availability among the camps surveyed demonstrates the versatility of the

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industry. Every camp surveyed has a gymnasium, recreation hall or similar large facility. These range in size from holding 300 persons to 1,000 persons. Thirteen such facilities hold at least 500 persons. The average facility accommodates 664 persons. The ability to utilize these assets for a variety of activities has allowed many camps to promote banquets, meetings, conferences and other events at their facilities during and beyond the camping season. This generates additional economic activity for the area in many instances.



Camp representatives were asked to identify the extent to which their facilities were used for other than traditional camp purposes. Eight camps sponsored sports camps, cheerleading camps and bands, three accommodated retreats and picnics and two employed their facilities as conference centers. Other non-camping activities included Judaic component programs, parties and a training center. Much more of this can be expected in future years as camp organizations capitalize on the multipurpose capacities of their facilities.

Camps typically open in early to late June, with one camp stating they opened prior to June 1, three camps opening prior to June 16 and ten camps prior to July 1. One camp indicated being open year round. Closing typically occurs the third or fourth week in August, although five indicated they closed in early to mid September.

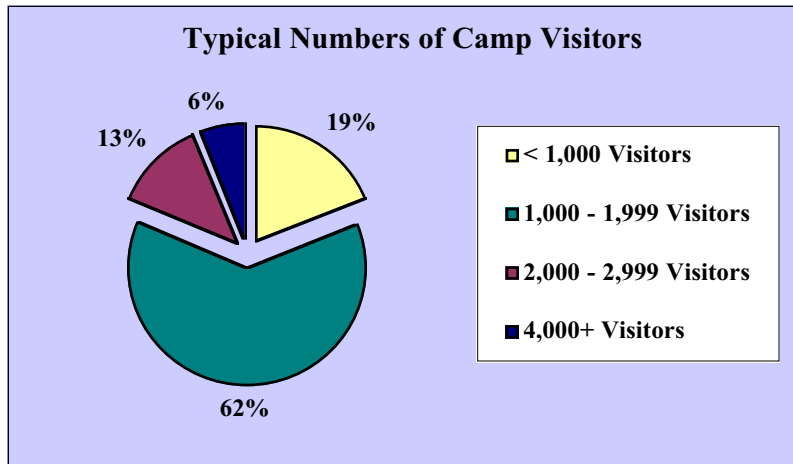
Off season events occur for a variety of purposes such as sports camps, corporate group meetings, reunions, open houses, skiing in the winter, Bar Mitzvahs and rental group activities. There is clearly much potential to expand the use of camp facilities seasonally as more marketing is done and more individuals learn of the resources and services available.

A large number of persons visit camps during the camping season. Fifteen camps indicated they received at least 1,000 visitors during the season, with one reporting 4,000 visitors during the season. Combined total visitation to all camps was 22,900 persons in 2001, an average of 1.431

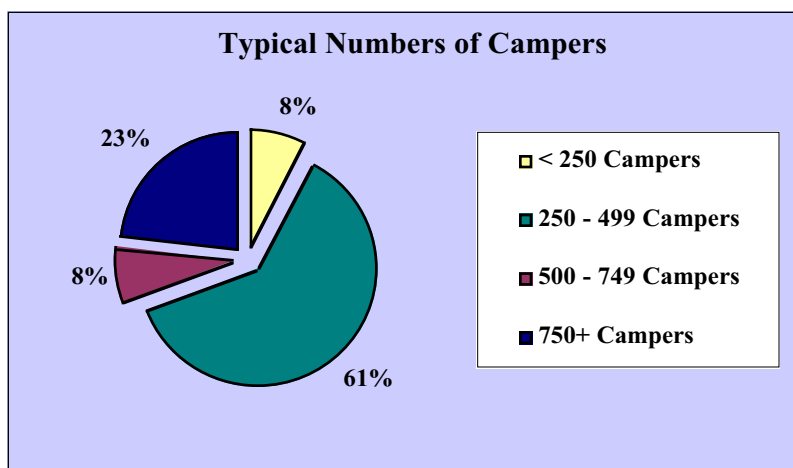
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persons per camp. Many of these individuals, of course, spend money in the area while visiting camps to tour the facilities or see their children. This generates considerable economic multiplier benefits for the region. These accrue to restaurants, hotels, bed and breakfasts and the businesses that serve these enterprises.



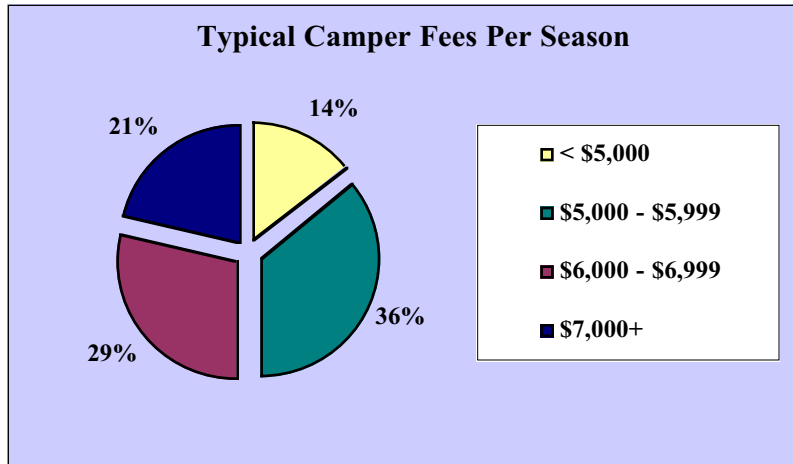
Campers themselves are also visitors, of course. There was a total of 7,428 campers reported for the 2001 season by the camp representatives who responded to the survey. This was an average of 571 persons per camp. The total number of campers visiting the area annually, based on this sampling of 41 regional camps, and accounting for the fact the largest camps have been included, exceeds 15,000 persons. Two camps served 1,200 campers each.



Camper fees charged for the season ranged from \$4,500 to \$7,500 per person. The average fee for the season was \$5,982. The average fee for one-month programs was \$3,029. The weekly fee average was \$794.

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Those camps focused on off-season use of their facilities for special events generate significant additional income for themselves and the area from these activities. Ten camps conduct some special events or other activity throughout the year. Over 50,000 persons attended events at these camps (banquets, conferences and meetings). One camp, however, was responsible for 80% of this activity. Camp revenue from these sources totaled \$2,995,000, and averaged \$272,000 for participating camps.

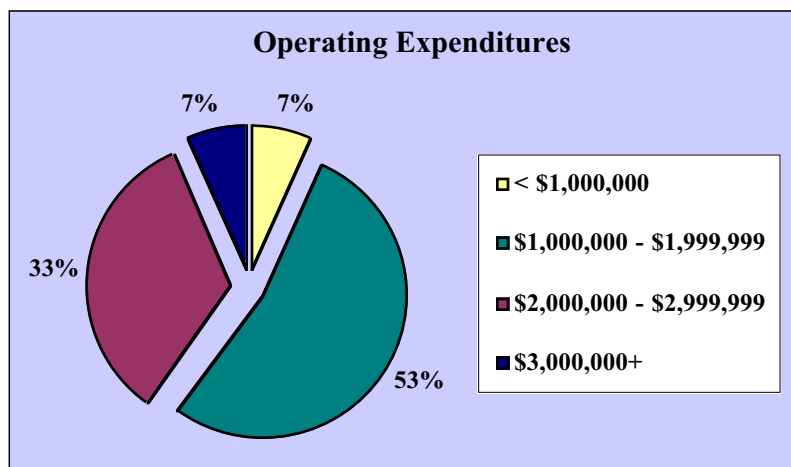
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4.0 Direct Impacts of Summer Camps

So as to assess direct impacts of the industry on the local economy, camps surveyed were asked several questions regarding operating expenditures for the year 2001. These represented monies spent on goods, services, wages, maintenance and other activities. These operational expenditures ranged from \$800,000 to \$6 million. Six camps spend \$2 million or more annually. The average operating expense per camp was, in fact, \$2,230,000 per year. Just 15 camp organizations were responsible for over \$33.4 million of expenditures.

Given the camps who did not respond or who are not members of the Association (there are a total of 37 summer camps in Wayne County according to tax assessment records and another four camps in adjoining Pike and Susquehanna Counties), direct expenditures by regional camps exceeds \$50 million per year, much of which is spent locally (see below). This figure allows for the fact that some of the larger camps are already included in the survey and is based on a \$2 million average expense (the average from the survey when the highest and lowest numbers are not included in the calculation).



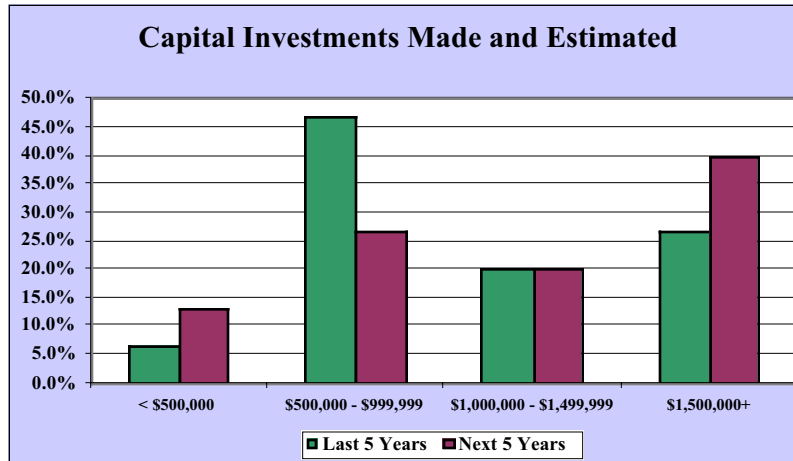
Continued capital investment is critical to the long term success of any business. Camps have been exemplary in this regard. This helps to explain their longevity as enterprises. A total of \$17,665,700 was invested over the last five years (from 1996-2001) by those camps surveyed. Seven camps invested \$1 million or more. The average capital investment made was \$1,178,000. Extrapolating this figure for all 41 camps within the County or Association suggests that the camp industry as a whole is investing approximately \$8,000,000 per year of new capital in the regional economy. This consistent investment of new capital helps protect existing employment while creating additional work opportunities for the future.

Investments expected in capital projects over the next five years totaled \$18,050,000 for those

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camp surveyed. Nine camps said they expected to make capital investments of \$1 million or more over the next five years and the average investment expectation is \$1,219,000. This is somewhat above the level of investment over the last five years. It is a very positive feature of the industry and supports the conclusion that camping will continue to be a strong part of the economy for many years to come, with expansion possibilities. Most importantly, it demonstrates industry self-confidence, a key ingredient to success.



Annual expenditures in several individual categories were queried. For example, food expenditures made locally were an estimated \$1,776,000. This compares to an estimated \$1,625,000 spent on non-local food expenditures. Average local expenditures on food per camp were \$111,000, as opposed to non-local food expenditures that averaged \$101,501.

Local transportation expenditures totaled an estimated \$526,300. An estimated \$443,000 was spent on non-local transportation. Average local expenditures on transportation per camp were \$32,894, compared to non-local average transportation costs of \$27,688.

Advertising costs locally were \$73,100 and non-locally were \$163,800, averaging \$4,807 and \$10,920 per camp, respectively. This demonstrates that much of the advertising employed by camps occurs before the camps open for the season and, of course, is directed at the metropolitan markets where the parents of campers reside.

Payroll expenses were reported as the largest category of local expenditures at \$2,127,000 annually (\$132,938 per camp), although there were also \$5,373,000 of non-local costs (\$336,438 average). The dollars expended are important for the multiplier impacts discussed later in this report. Local payroll costs were as high as \$300,000 in two instances. Interestingly enough, three camps reported using local employees only. Presumably, this did not include owner-managers.

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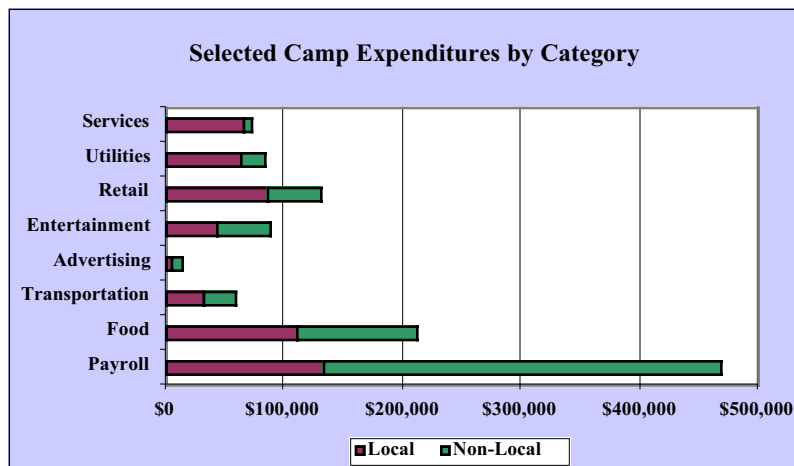
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Camper entertainment expenditures reported totaled \$705,400 for local costs (\$44,000 average) and \$725,000 for non-local costs (\$45,313), close to a 50-50 split. The largest total local cost was \$200,000.

Retail expenditures totaled \$1,385,000 locally (\$86,563 average) and \$710,500 non-locally (\$44,406 average). Four camps spent \$200,000 or more in retail expenditures locally.

The utilities category includes phone, electric and related costs. There were \$1,010,300 of local expenditures (\$63,144 average) and \$344,000 of non local costs (\$21,500) for utilities.

General services (e.g. laundry services, electricians, etc.) are provided locally for the most part. Total costs were \$1,061,300 (average of \$66,363 per camp) while non-local costs were only \$107,000 (average of \$6,688 per camp).

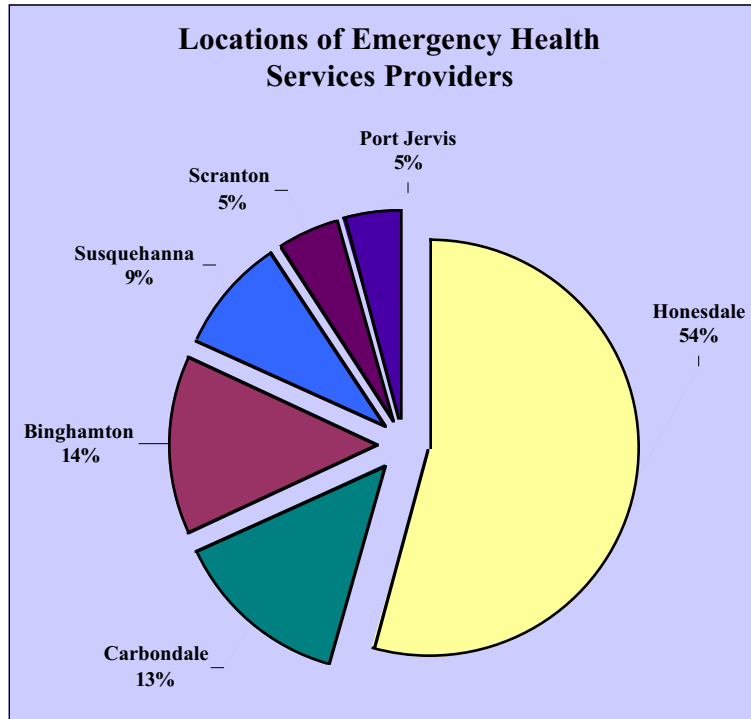


Wayne County camping organizations use and support a number of valuable services. They were asked to identify the types of medical facilities and personnel available to their camps. Thirteen of the 15 camp representatives answering indicated that they had a doctor present, with an average of five nurses each. Each camp had some form of health clinic, infirmary or wellness center on-site.

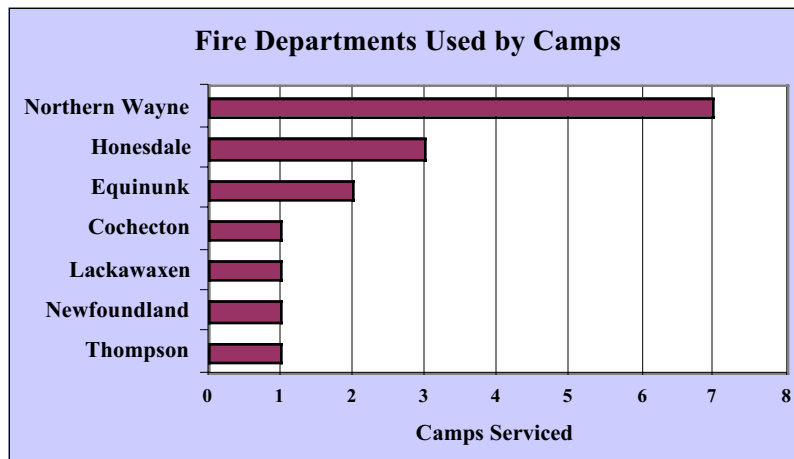
The Wayne Memorial Hospital in Honesdale was the emergency health services provider for 11 of 15 camping organizations answering this question (73%), while other camps relied upon facilities in Carbondale (Marion Community Hospital - 3), Susquehanna (Barnes-Kasson Hospital - 2), Binghamton (Binghamton General Hospital - 2, Wilson Memorial Hospital - 1), Scranton (Community Medical Center - 1) and Port Jervis (Mercy Hospital - 1).

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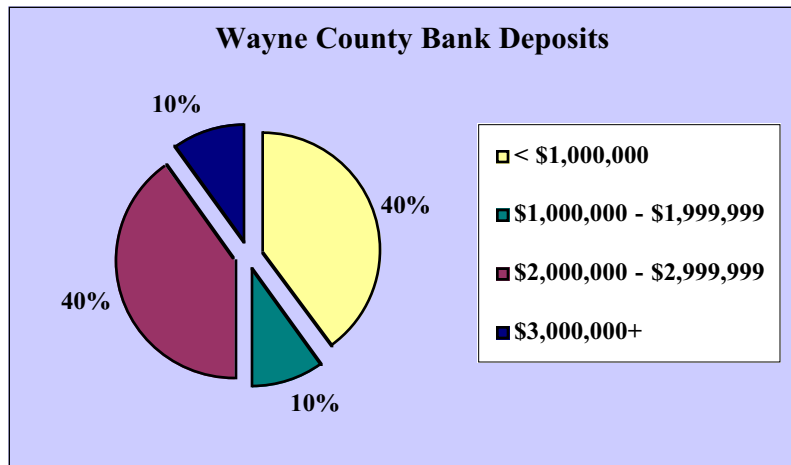
Camp representatives were asked how often they used local police or fire protection services in the year 2001. Five camps indicated that they never used fire or police services, seven stated they used the services once, two had used them on two occasions and one had done so three times. All respondents to these questions indicated that services had been efficiently provided. Seven camps relied upon the Northern Wayne Fire Company for service, three used the Honesdale Fire Department, two were serviced by the Equinunk Fire Company and others used services from Thompson, Newfoundland, Lackawaxen and Cocheton.



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Several questions were asked regarding the financial contributions of camps and their usage of local financial institutions. All camp organizations indicated they had bank accounts in Wayne County, with the largest having \$4 million in deposits for 2001, and several others in the range of \$1 to 2.5 million. Total deposits for the ten camps reporting in this instance were almost \$16 million and the average was \$1,562,000 per camp. This constitutes a very large and beneficial impact on the health of Wayne County's banking industry.



Ten camps indicated they also had mortgage accounts in a Wayne County bank with the largest being \$2 million, and several of \$800,000 and above. Two camps indicated they had mortgage accounts in other Northeastern Pennsylvania banks, one for \$2 million. The average mortgage account was \$1,097,000 for all camps reporting on this question.

The above data strongly states the case that the camp industry is invested in local financial institutions and is likely to continue to utilize these facilities as other capital improvements are made and the industry grows.

Total charitable contributions made to Wayne County groups such as the Red Cross, hospital, fire companies and others by reporting camps amounted to \$37,900 in 2001, for an average of \$3,445 per camp.

Large amounts of taxes were paid by reporting camps for the year 2001. Pennsylvania Sales Tax payments amounted to \$29,500, an average of \$4,916 per taxpaying camp. Three camps indicated they were Section 501(c)(3) nonprofit corporations and also tax exempt.

Local taxes paid to school districts, the County and municipalities for the 14 reporting camps on this question totaled \$665,771, an average of \$47,555 per camp. This makes the camps extraordinarily large and important parts of the tax base for all localities where they are situated.

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Two camps, in fact, paid \$70,000 in property taxes. Many other communities have no such large taxpayers. Summer camps also consume relatively little in the way of services. Therefore, they are large net tax producers for the region.

A review of tax assessment data for Wayne County for 2002 indicates that the County has 52 children's camp parcels on its tax rolls, with a combined land area of 6,116 acres and an assessed value of \$5,049,100. This translates into a market value of \$56,095,501. It does not necessarily include all taxable camp properties because some surrounding open space lands may be classified and assessed separately, plus some lands are held in individual ownerships and may not, for this reason, be included in the children's camp assessment category. This market value should, therefore, be viewed as the minimum tax base generated by summer camps in Wayne County. The following table provides the essential data:

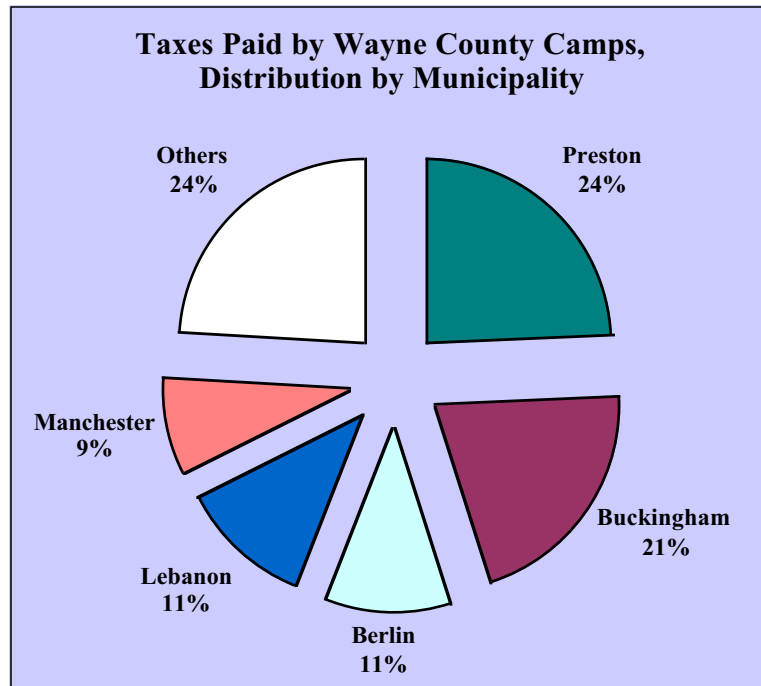
Taxes Generated by Wayne County Camps								
Borough/ Township/ County	Assessed Land Value	Assessed Improvements Value	Total Assessed Value	Total Tax Rate	Total Taxes Produced	Total Market Value	Actual Tax Rate	Camp % of Tax Base
Preston	\$139,570	\$1,083,740	\$1,223,310	21.80%	\$266,682	\$13,590,974	1.96%	14%
Buckingham	\$109,310	\$946,290	\$1,055,600	21.60%	\$228,010	\$11,727,716	1.94%	21%
Berlin	\$50,100	\$505,380	\$555,480	22.30%	\$123,872	\$6,171,383	2.01%	6%
Lebanon	\$40,570	\$525,740	\$566,310	21.70%	\$122,889	\$6,291,704	1.95%	14%
Manchester	\$48,170	\$386,740	\$434,910	22.35%	\$97,202	\$4,831,850	2.01%	7%
Scott	\$29,120	\$283,190	\$312,310	21.60%	\$67,459	\$3,469,764	1.94%	9%
Oregon	\$10,390	\$262,310	\$272,700	21.50%	\$58,631	\$3,029,697	1.94%	8%
Dyberry	\$23,830	\$170,190	\$194,020	21.20%	\$41,132	\$2,155,562	1.91%	4%
Damascus	\$72,310	\$96,940	\$169,250	22.30%	\$37,743	\$1,880,368	2.01%	1%
Clinton	\$7,350	\$88,220	\$95,570	21.00%	\$20,070	\$1,061,783	1.89%	1%
Waymart	\$3,000	\$66,090	\$69,090	23.20%	\$16,029	\$767,590	2.09%	2%
Paupack	\$19,420	\$50,280	\$69,700	20.32%	\$14,166	\$774,367	1.83%	<1%
Sterling	\$7,070	\$12,460	\$19,530	21.50%	\$4,199	\$216,978	1.94%	<1%
Canaan	\$11,320	\$0	\$11,320	21.10%	\$2,389	\$125,765	1.90%	<1%
Wayne County	\$571,530	\$4,477,570	\$5,049,100	21.80%	\$1,100,471	\$56,095,501	1.96%	2%

Fourteen, or half, of Wayne County's municipalities include children's camps. These camps pay a combined total of \$1,100,471 in real estate property taxes at 2002 tax rates. Tax revenues generated by camps range from a low of \$2,389 in Canaan Township to a high of \$266,682 in Preston Township. Camps pay over \$100,000 in taxes in four different municipalities. They pay 21% of the taxes in Buckingham Township, the largest single assessment category for that municipality. They also pay 14% of taxes each in Preston and Lebanon Townships, 9% in Scott Township and 8% in Oregon Township, all Northern Wayne County communities.

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Countywide, children's camps pay fully 2.0% of all real estate property taxes, an impressive statistic given that the industry is generally confined to a relatively few communities.



These numbers indicate the major positive fiscal impacts of the camp industry on local government. No other commercial assessment classification produces more taxes countywide than children's camps (Code 751 in the Wayne County Assessment Office records). Indeed, among all individual assessment classifications, only single-family dwellings (Codes 110 and R02), electric utilities (Code 962) and general agriculture (Code 810) pay more local property taxes.

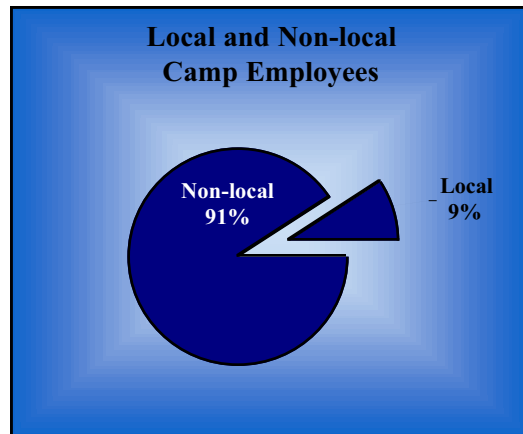
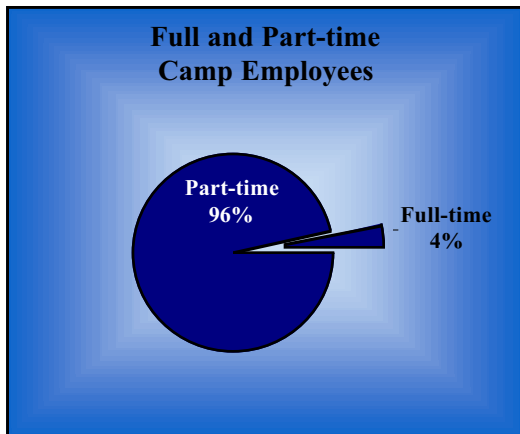
Camp representatives were asked to indicate the numbers of employees they had on-site throughout different parts of the year. The 16 reporting camps stated that they used a combined total of 1,996 employees annually at their local facilities.

Part-time employees (including many seasonal employees) totaled 1,922 persons. The largest part-time employer among the camps surveyed used 270 such employees, while average part-time employment was 120 persons.

Full-time employees totaled 74 for the 16 camps combined or an average of 4.6 full-time jobs per camp. Some 183 or 9% of all employees were reported to be local residents, an average of 11.4 jobs per camp.

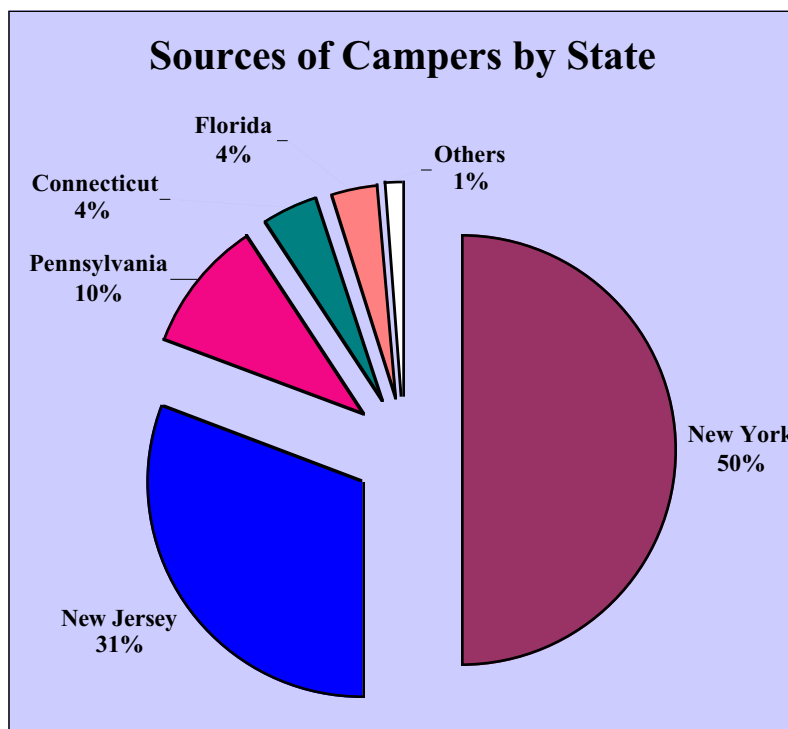
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These are very significant job numbers and, of course, are actually even higher in light of the fact that not every camp responded. There are also major multiplier benefits connected with the part-time employment because so many of these employees are recruited from outside the area and many foreign countries. They spend much of their income in the area while residing locally.

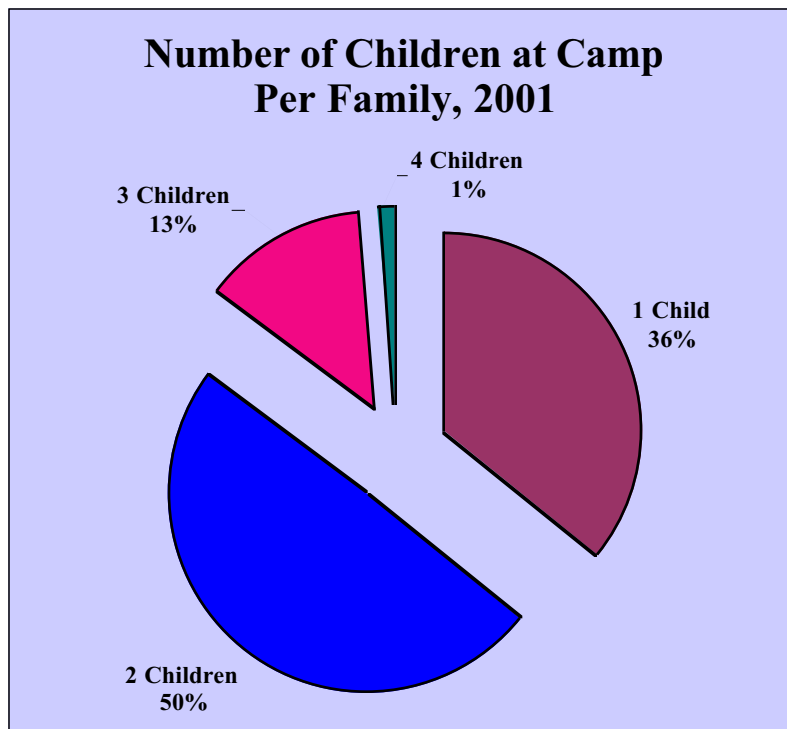
Parents and employees were also surveyed to further gauge the direct impacts of camp employment and visitation. The results demonstrate that camps contribute to the overall quality of life within the region while introducing new people to Wayne County and the region.



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Campers and parents visiting the area primarily came from New York and New Jersey as the chart above illustrates. The majority of respondents had at least two children in a Wayne County camp, with some as high as four. The average was 1.8 children. The number of children sent by parents over the years, was also typically two but, in many cases, three or four children. One respondent reported sending 5 children to the camp in question.

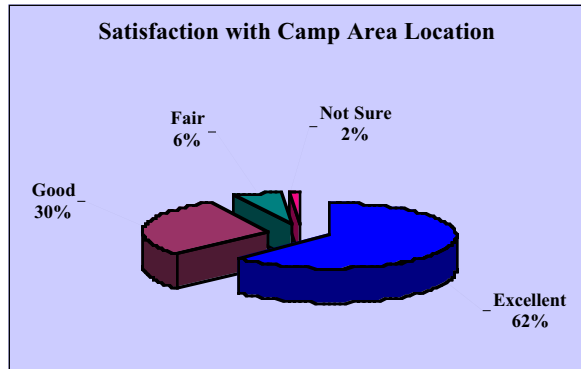
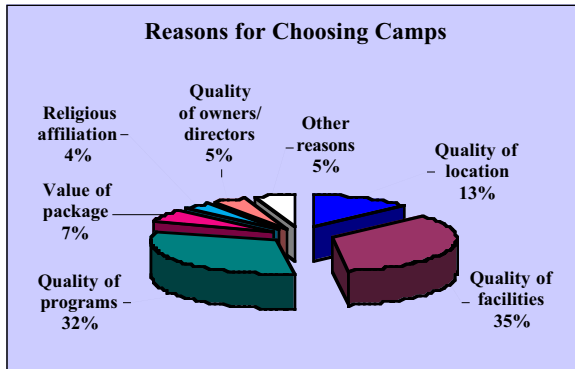


Some 95% of respondents stated that their overall level of satisfaction with the camp where they sent their children was excellent and the remainder described it as good. Reasons given for choosing a particular camp ranged from quality of facilities (by far the highest category at 35%), to quality of programs (32%), quality of location (13%), value of package (7%), quality of owners/directors (5%) and religious affiliation (4%). Some 63% rated their level of satisfaction with the location of the camp as excellent and 30% rated the area as good. Others thought the location was fair (6%) or weren't sure (2%).

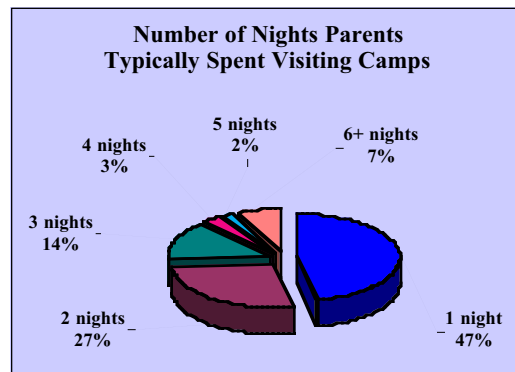
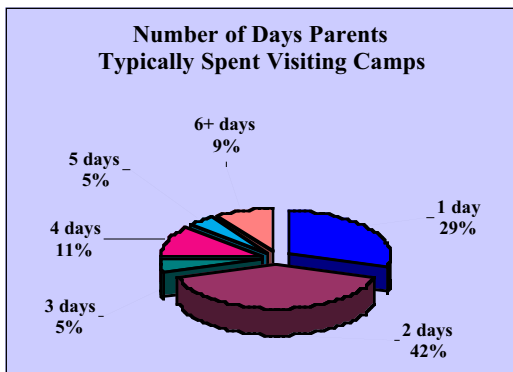
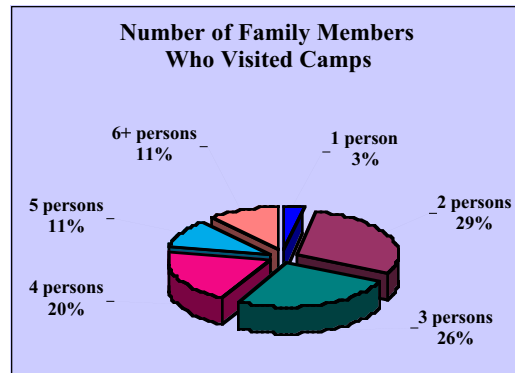
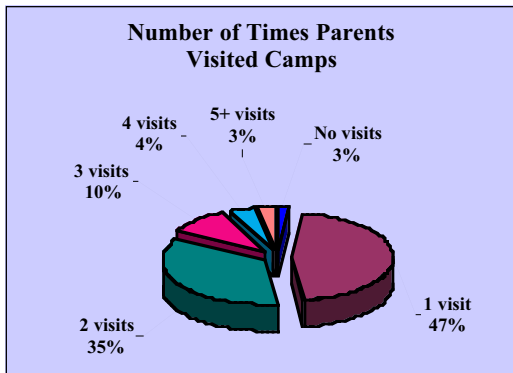
Significantly, 44% of respondents indicated that visiting the camp made them want to visit the area for other reasons, illustrating the opportunity to market additional products and services to camper parents, thereby increasing tourism revenues to the area. Some 10% indicated that visiting the camp made them more likely to stay in the area. More importantly, 10% of respondents also indicated that visiting the camp made them want to consider investing in the area. There is, clearly, much economic development potential associated with camper parents that should be pursued by County business leaders.

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Most parents visited camp at least once in 2001, but many visited multiple times. Typically, two or more persons visited and stayed two days and one night. Most (77%) stayed at a hotel, motel or bed and breakfast, although 12% stayed at the camp, with friends (9%) or at campgrounds (2%).



Parents were asked to estimate their local expenditures on a daily basis when visiting camp. The table following details the results:

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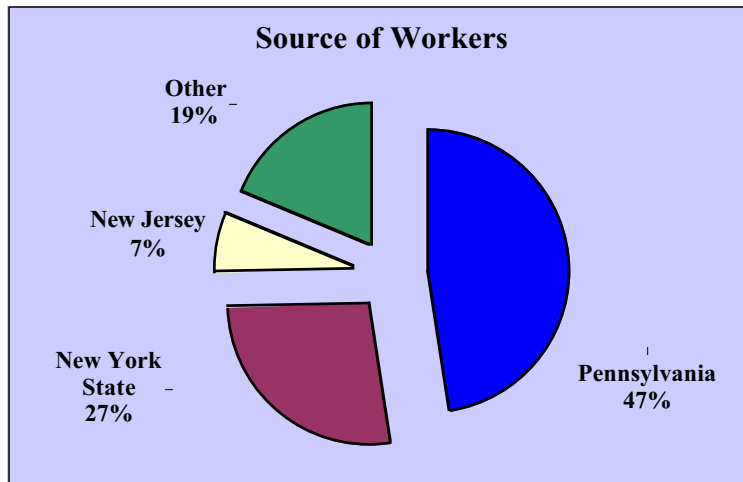
Estimated Daily Expenditures Per Camper Parent on Visits						
Range of Expenses	Food	Lodging	Transportation	Entertainment	Retail	Totals
\$5 to \$25	19	1	22	12	22	76
\$26 to \$75	38	7	28	9	15	97
\$76 to \$100	25	20	1	3	14	63
\$101 to \$200	22	14	1	0	5	42
\$201 to \$400	5	20	1	0	2	28
Totals	109	62	53	24	58	306
Low Range	\$6,210	\$7,141	\$1,216	\$522	\$2,471	\$17,560
High Range	\$12,225	\$13,350	\$3,350	\$1,275	\$4,875	\$35,075
Average Per Camper Parent	\$85	\$165	\$43	\$37	\$63	\$394

The typical camper parents spend \$394 per day locally when visiting children at local summer camps. This represents a direct impact on the regional economy of \$3,283,000 in tourism expenditures (assuming 15,000 campers and using the average of 1.8 children sent to camp per family).

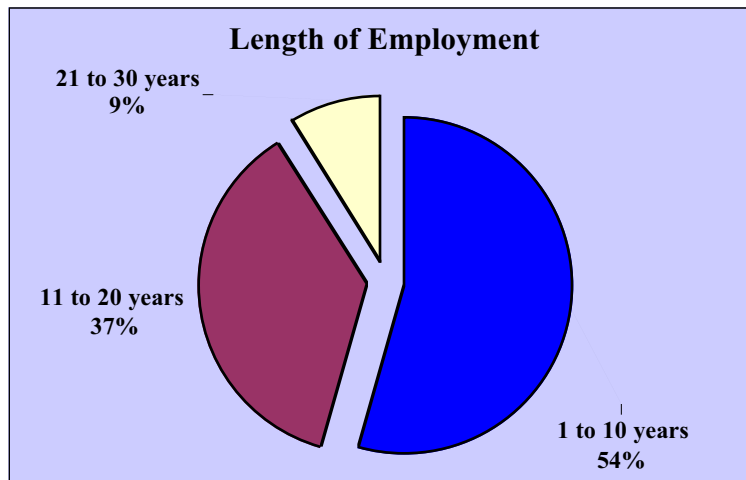
Employees were also asked to help identify the direct impacts of camps on the local economy. Most come from Pennsylvania with quite a few from New York State.

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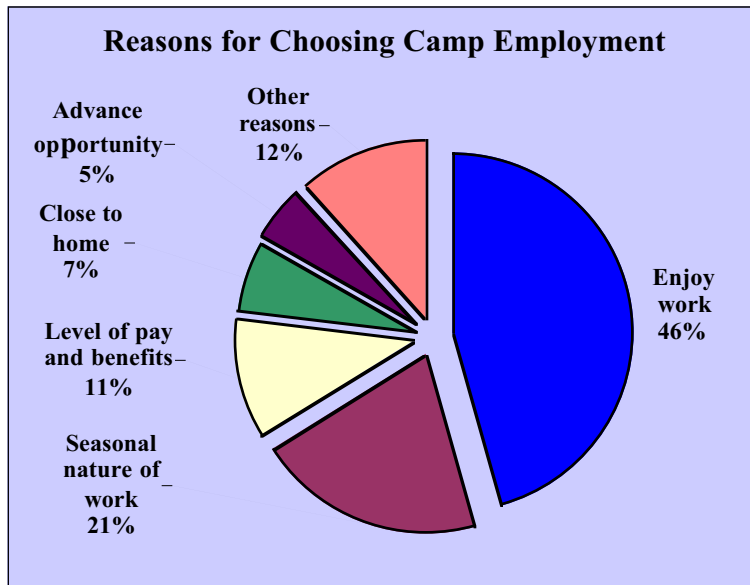
The number of years employees have worked at their camps indicates a large number of return workers and high level of job satisfaction. Some 26% said they planned to work another 2-5 years at the camp and 57% expected to work another 5-10 years there.



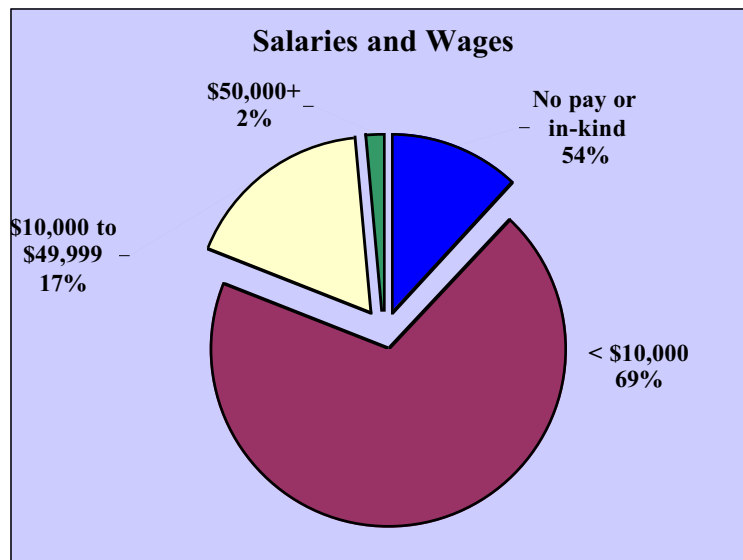
Indeed, almost everyone (92%) rated the level of satisfaction with their job at the camp as being excellent and the remainder described their experience as good. They chose to work at their camps for various reasons. Enjoyability of the work was cited most often and seasonal nature of work as the next most important reason.

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Salaries and wages of camp workers varied widely because of the combination of part-time, seasonal and full-time workers used. The following chart provides an overview.



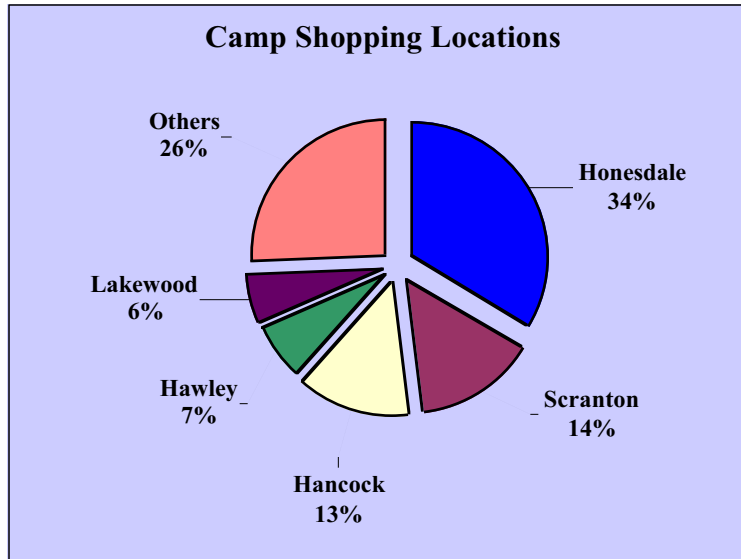
A large majority of employees (92%) said that working at the camp had made them more likely to stay in the area. Some 42% felt the value of the camp was not fully appreciated by the community but 76% believed that the community was fully appreciated by the camp.

Some 70% of employees surveyed made purchases for their camps. Honesdale was the first and top second choice of shopping locations for the majority of camp employees. Scranton was the

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top third choice. Hancock was the second choice as primary and secondary shopping location. The following chart indicates the overall popularity of the various locations.



Employees were also asked about other important contributions their camp makes to the area. Here are a sampling of responses:

- Camp staff goes to movies, restaurants, bars, etc. on days off.
- Camp makes purchases on a daily basis in the local area.
- Camp supports local businesses.
- Camp provides employment for local day workers.
- Visiting parents spend money in local establishments.
- Children at camp attend movies.
- Camp expands tourism.
- The diversity of camp staff from other states and counties adds to the area.
- Camp is often the first time campers learn about country life.

These insights reflect the positive experiences of employees as well as the parents. They demonstrate that the camp industry is alive and well, is making substantial contributions to the

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area and has a tremendous growth potential for the future.

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5.0 Contributions of the Camp Industry to the Local Economy

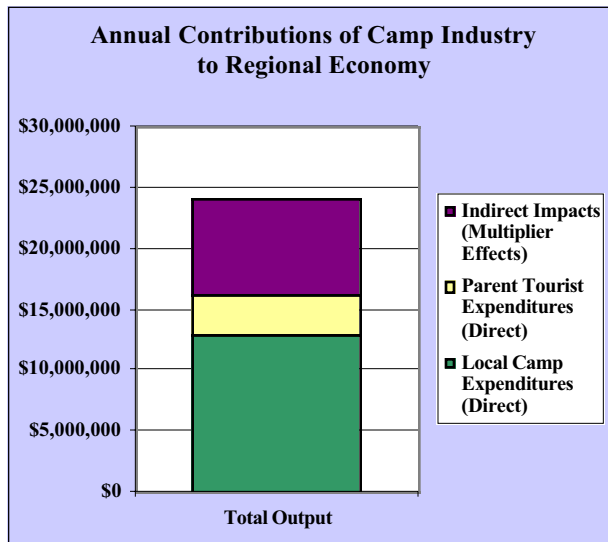
The foregoing data on direct impacts of the camping industry within Wayne County and adjoining areas of Pike and Susquehanna Counties indicate it is a \$50 million annual business. Not all of this money is spent locally but much of it is. Surveys indicated local expenditures for payroll, food, transportation, advertising, entertainment, retail goods, utilities and services averaged \$408,857 per camp in 2001. Extrapolated to the 41 regional camps and allowing for the fact larger camps are already included in the averages, this represents an estimated \$12-14 million of direct impact. Parent tourism expenditures (estimated at \$3,283,000) must be added to this for a total of approximately \$16 million in direct contributions to the local economy.

These figures, however, do not measure the full economic impact of camping on the local economy, because monies spent locally get recycled several times. When a local camp purchases recreation services from a local provider, for example, some portion of those dollars get reinvested in the community to pay other local suppliers (e.g. the garage that maintains his vehicles). Some portion of those dollars similarly get re-spent to hire mechanics and the mechanic buys coffee at a convenience store. The cumulative impact of these expenditures down to the level that little or nothing is left to spend in Wayne County is known as the multiplier effect.

The U.S. Bureau of Economic Analysis (BEA) estimate these effects using regional input-output analysis. An analysis was requested on Wayne County. It indicated children's camps, which are included in former SIC code 7032 as one of several "other lodging places," enjoy a total output multiplier of 1.4743. A dollar of sales generates \$1.47 of total output after circulating through the economy. Therefore, the \$16 million of direct camp impacts actually produces \$24 million of total output for the regional economy. This constitutes a major industry by any standard.

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A recent employment analysis conducted for Wayne County by the Lancaster County Workforce Investment Board (a service provider to other such boards) further substantiates the importance of the camping industry in the regional economy. It indicates that summer camps (once again, SIC Code 7032) grew from 305 regular employees in 1995 to 427 in 2000, bearing in mind that many camp employees are secured on a temporary basis from employment services and international programs. This represented an impressive 40% gain.

More importantly, camps had the highest "location quotient" of any industry studied in the County. This measures "the amount of an industry located in a specific area relative to the normal average distribution. An industry matching the normal average distribution would have a location quotient of 1.00." Children's camps had a 2000 location quotient of 152.89, up from 137.48 in 1995. This means there was 152.89 times as much camp employment in Wayne County as Commonwealth averages would suggest. This is an excellent measure of the prominence of camping in the local economy. Camping is, on the basis of this extraordinary number and the fact it is growing, classified as a "notable industry" for the County in the workforce study.

Camps also had a "competitive employment change" factor of 55.73 for the 1995 to 2000 period. This indicates that 56 of the 122 jobs gained over the five years were related to local factors, while 66 were attributable to the general growth of the industry. This is a valuable indicator of the market competitive advantages Wayne County offers for the industry. The fact there is a balance between jobs grown due to local factors and those due to the health of the industry is also good. It suggests sustained growth of Wayne County's camping industry is possible.

Finally, the workforce study indicated that camp payroll per employee grew from an average of \$16,980 in 1995 to \$21,972 in 2000. Adjusted for inflation, this represented a \$2,893 real gain

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(a 15.2% increase). This is one more indicator of the strength of the industry and its importance to the local economy.

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6.0 Recommendations

This study of the economic impacts of Wayne County's summer camp industry has revealed some needs of the industry and suggested some measures that might be taken to further improve it. These include the following:

- 1) There is a need to make more information on the contributions of the camping industry constantly available to Wayne County citizens and local officials. Broad distribution of this report on a continuing basis is recommended as one way of accomplishing this. Initial distribution should be accompanied by a WIDCO news release. Presentations should be scheduled with local officials. A copy should also be made available through the Wayne County Camp Association's website. A Portable Data Format (PDF) file is being provided for this purpose.
- 2) Many of the service needs of the industry can be addressed with better communications. The Camp Association annual trade show held in January is an excellent initiative along this line. Similar initiatives from the vendor side are also needed. Camps have special needs for services such as horseback riding and hotel accommodations that local Chambers of Commerce should focus on as opportunities for their own members. Providing all camps with listings of local services available at the outset of each season would also help (e.g., an accommodations brochure for distribution to camps).
- 3) There is also a need to develop lasting positive relationships between camps and the communities in which they are located. Few residents are aware of the major economic contributions of the industry. Many camps are unaware of the challenges communities face or the impacts they have on their neighbors. More sharing of facilities is appropriate, for example. One Pike County camp makes its recreational facilities available for community use before and after the season. School facilities, likewise, could be made available to camps for some of their programs during the summer. Some Wayne County camps have, from time to time, made their programs available on a day basis to local residents free of charge as a good will gesture. This is another excellent initiative worthy of emulation.
- 4) Camps also face some special challenges in dealing with government and utilities. Most owners are from out-of-state and have only a limited understanding of Pennsylvania government. Likewise, public officials, who only get to deal with camps for a few weeks each year, tend to not know much about their operations. When problems arise they often don't get to deal with them before the season is over and so the situation is recycled to the next year. Camps also get treated poorly by utility companies who have no programs to accommodate seasonal uses of this nature and therefore, charge larger fees for

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startups and disconnects of service at the beginning and end of seasons. WIDCO, the Chamber of Commerce and local governments need to become more involved in these issues, as advocates for both the industry and communities, bringing the parties together to help resolve them.

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APPENDICES:

1 - Wayne County Camp Association Membership

2 - Camp, Employee and Parent Survey Forms

APPENDIX 1

Wayne County Camp Association Membership

Wayne County Camp Association Members - 2002

B'Nai B'rith Perlman Camp

Bryn Mawr Camp

Camp Cayuga

Camp Lavi

Camp Lohikan

Camp Morasha

Camp Moshava

Camp Poyntelle

Camp Starlight

Camp Tioga

Camp Towanda

Camp Wayne for Boys

Camp Wayne for Girls

Camp Weequahic

Camp Westmont

Chen-A-Wanda

Equinunk/Blue Ridge Camps

Indian Head Camp

Island Lake Sports & Arts Camp

Lake Owego Camp

New Jersey YMHA-YWHA Camps

Pine Forest Camp

Pocono Ridge Camp

Ramah in the Poconos

Seneca Lake Camp

Summit Camp

Timber Tops Camp

Trails End Camp

Tyler Hill Camp

APPENDIX 2

Camp, Employee and Parent Survey Forms

